The financial services industry has been asking for a truly integrated web-based work portal.
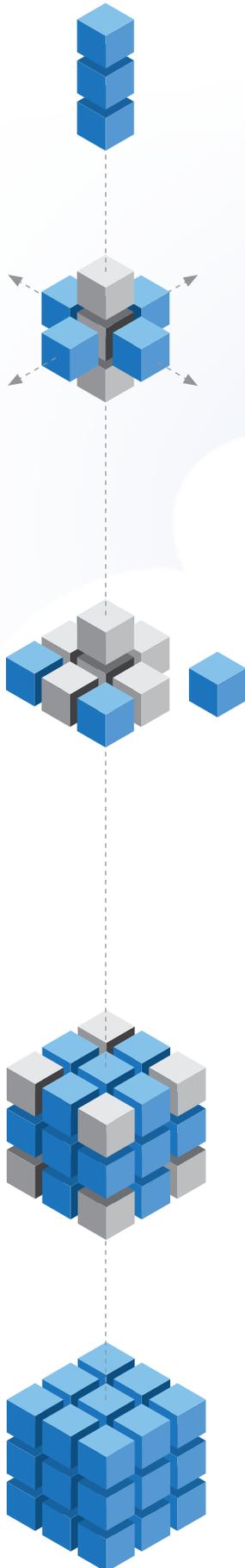
We heard you.

Compliant

Secure

Affordable

MyOffice®

Where productivity soars!

A powerful CRM database is the core of your web-based work portal.

- The MyOffice® platform features its own feature-rich, customizable CRM system, but any third-party system can be integrated.

- CRM features include dynamic 2-way syncing of data and auto-import tools to bring in outside data.

A digital Forms Wizard speeds transactions and enables dynamic, enterprise-wide data sharing.

- The Forms Wizard is a powerful, customizable Account Opening System (AOS) that integrates with Laser App® to speed transactions and provide the basis for enterprise data sharing.

- The Wizard features autofill and 2-way data syncing, plus transaction-specific requirement reminders to eliminate errors and NIGO concerns.

- Each Wizard transaction is placed in a client-specific Digital Client Binder that consolidates all account activity in one easy-to-access location.

Our web-based portal conforms to your business, not the other way around.

- MyOffice doesn't make you change the way you work. It automates and streamlines your current workflows into a seamless enterprise environment.

- MyOffice has no product bias, so you can use a "best of breed" approach that allows you to incorporate the exact internal and external products and processes that are right for your business.

- Automatic routing and queuing make sure data and documents are received and reviewed in the proper sequence by the proper people.

- All data and document movements and reviews are time, date, and user stamped to document processes, creating a permanent audit trail of actions.

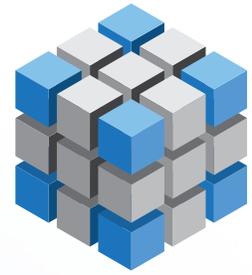## Internal tools improve oversight and communication.

- MyOffice portals include built-in tools to improve management oversight, including a service center "ticketing" system that identifies workflow bottlenecks and performance, and a global search tool that provides access to information anywhere in the system.

- Communication and collaboration are enhanced through newsletter and group forum features, as well as virtual team workrooms where data and documents can be shared on an invitation-only basis.

All work-related tools, platforms, and websites are available within a seamless Single Sign-On (SSO) workspace.

- All internal and external work tools can be accessed without remembering individual logins and passwords, speeding navigation within the portal.

- Third-party platforms and tools are easily integrated for seamless access and processing.
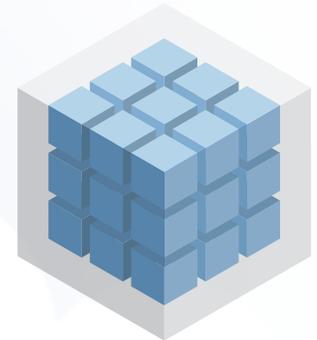
Compliance is the cornerstone of all MyOffice work portals.

- MyOffice portals offer built-in compliance solutions that meet the specific needs of the financial services market, including automated and documented reviews, blotters, advertising and correspondence submissions, training and seminar submissions, and 17a-3 notifications.

- Exception reports and customized audit reports are available to assist in internal oversight and regulatory audits.

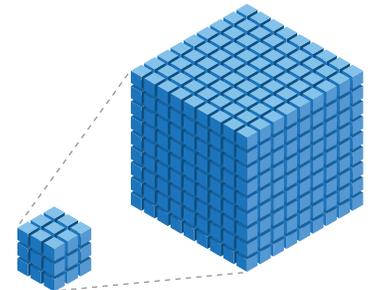- Of course, MyOffice digital data archives are FINRA-compliant.

MyOffice web portals work within a force field of security.

- As a Software as a Service (SaaS) solutions provider, MyOffice offers a 3-tier IT infrastructure that incorporates state-of-the-art technologies and practices.

- Our hosting facilities are SAS-70 Type II compliant and feature redundant firewalls, redundant and load-balanced processing, automated remote backups, 24/7/365 certified monitoring and management, uncompromised premise security and integrity, and detailed contingency plans.

- All data transmissions are made through industry-standard SSL (Secure Socket Layer) encryption and intrusion-protection protocols.

- Our SaaS business model eliminates customer needs for the expense, management and maintenance of IT infrastructure, allowing them to concentrate on their core business.

MyOffice is affordable, easy to deploy, and scalable.

- MyOffice utilizes a powerful, feature-rich proprietary software platform that speeds development and deployment of work portals. With core functionality and processes residing within the platform, development can focus on customization rather than time-consuming and expensive ground-up creation.

- Our portals feature a proprietary modular design that enables easy modifications to the system whenever business needs change.

- The design of MyOffice solutions make them inherently scalable to serve the needs of both small and large enterprises.

If you want a secure, compliant, web-based work portal that can lead to higher productivity and greater profits, call toll-free at 1-855-730-0998, or send an email to info@MyOfficePortals.com

MyOffice®

Where productivity soars!

701 Tama St.
Marion, Iowa 52302

(855) 730-0998 *toll-free*

info@MyOfficePortals.com
MyOfficePortals.com

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701 Tama St.
Marion, Iowa 52302

Finally, a seamless way to unify reps in the field with your home office.

"The technologies offered by MyOffice are not only the future of our company; they are the future of our industry."

– Financial Services Executive

"My last broker was a large national financial firm, and their broker platform technology doesn't begin to compare with what we have here. The workflow integration of this system makes my practice much more efficient."

– Registered Representative

"As a registered sales assistant with multiple reps, being able to submit most of our paperwork online helps us to streamline our process."

– Registered Sales Assistant

"The system has saved us considerable time and effort in compiling data and records for our FINRA audit, but even more important is that we now have total confidence in the integrity of the data we're providing."

– Chief Compliance Officer

"I just prepared and sent an application to a client for signature, got it back and submitted it to the home office, all in less than five minutes and without leaving my chair."

– Registered Representative